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2009 Edition

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develop 100

EDITORIAL

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ABOUT THE DEVELOP 100

The 2009 *Develop 100* was formulated entirely by the *Develop* magazine team after lengthy debate.

In order to decide our listing of 100 we started with a long list of studios which had released key titles during calendar year 2008.

We then whittled that list down by taking into account a number of factors. These included end of calendar year 2008 charts distributed by GfK-ChartTrack (UK), NPD (USA) and Famitsu (Japan). The power and impact of new non-retail channels, such as iPhone, MMO, casual and social network games was also taken into account.

We also referred to reports aggregating review score data and critical commentary as listed on Metacritic.com and kindly supplied by Gamequarry.com.

Finally, we factored in more instinctual elements such as general industry standing, studio reputation, publisher relations and general all-round brilliance.

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MARCHING TO A DIFFERENT BEAT

Develop 100 editor **Owain Bennallack** provides a guide to the key trends of this year's listing…

Ten years ago, the music industry faced a revolution it barely acknowledged. The business model that fuelled its excesses for 30 years – recorded albums and singles, first vinyl and later CD – was put on notice. Consumers would still want music – more than ever, and in more places, too – and kids will forever worship new bands. But nobody would traipse to town to pay (then) £12 for an album when they could click their mouse and get it in seconds, very possibly for free.

Fans said so, and so did many artists. Technology companies naturally made the case, too. But record execs favoured comforting words about the collectability of CDs and buying singles in Woolworths.

Now Woolworths is gone, CDs are headed the same way, and iTunes is the world's highest-profile music retailer catering for those over 35 who still feel the need to pay. Bands make more money from merchandising and performing than from record sales, and Google is begged for better royalties for music appearing on YouTube. The old business has been decimated.

The same is happening to games. The *Develop 100*'s unique proposition was to highlight the money-making success of gaming's creatives rather than its middlemen, based on UK retail sales. But the End Is Nigh for the shop-centric model. While gamers will certainly be buying boxed product for this generation and likely the next, revenues will dwindle as digital distribution changes everything.

While piracy saw emerging markets such as China and South Korea pioneer the new revenue streams, it was Blizzard that up-ended Western publishers' boardroom tables. Underpinned by the colossal subscription revenues of *World of Warcraft*, Activision Blizzard is now gaming's biggest elephant, pushing retail titan EA (which had its chance previously with *Ultima Online*) into second place.

At the other end of the spectrum, we have the developer-empowering iPhone App Store. In between are manufacturers' content marketplaces such as PSN and XBLA (Activision Blizzard made $10 million in nine days from extra *Call of Duty 4* content) burgeoning third-party solutions such as Valve's Steam, and free-to-play models that gather cash through micro-transactions and advertising.

The studios that emerge best-placed from this reinvention will not necessarily be those who thrived under the old regime. Reflecting these changes, the *Develop* 100 has become more subjective. We've based this listing primarily on sales data, but we've also tried to encapsulate the hundred studios best navigating the confluence of shifting business models and emerging markets and technologies while delivering the best games, too.

Retail sales remain critically important in most cases, but who knows for how much longer? Certainly, tomorrow's winners will be rewarded commercially through very different means. The really old songs never die – quality will always be key – but just like music before it, the games industry must establish new ways of singing for its supper.

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GAME TECHNOLOGIES

THE NEW FACE OF TRIPLE-A

Emergent's CEO **Geoffrey Selzer** heralds the latest Develop 100, praises the winners, and offers some sage advice on the future of games development and technology…

Building a game is today almost an unfathomably difficult undertaking.

The sheer depth of creative intellect necessary to invent new forms of interaction that can sustain discerning interests without the aid of traditional story techniques is akin to developing a whole new language. Add to that the awesome scope of conceiving the technical architecture to make a 3D environment come to life. The creative alchemy that follows and is manifest as a fully fleshed out and completed game is a mammoth achievement.

These accomplishments are what the *Develop 100* is here to acknowledge – some of the best creative achievements that the entertainment industry has to offer.

Let us take a moment and look at who we are and what we have accomplished as an industry.

To those on the list of this year's *Develop 100*: our hats are off, and this moment is an acknowledgement of you and your work.

With this achievement comes great expectation. In this past year, we have seen some incredible events in video games. A single game surpassed 11 million active subscribers (about the population of Los Angeles), generating over $1bn of annual revenue (maybe $2bn), a fully procedural triple-A game was launched to great success, and a phone became the hottest game platform in the market within just a few months of its launch.

These milestones feel like just the beginning. Responsibility falls to those honored in this publication, and all of us in the industry, to push the boundaries even further.

In the midst of all this success, there are some great pressures. The greatest liquidity crisis in the history of the world is having its impact on our industry and many of our colleagues are experiencing new challenges.

Over 5,000 people were laid off in our industry this past year in the US alone, and we may not have seen the end of it. Substantial consolidation in the publishing community continues, many established and new studios with great ambition are being forced to close their doors, and further economic refinements are causing contraction in the number and the budget of large titles.

These challenges are accelerating trends that we have seen for some time, requiring some deep thinking about how we evolve as an industry and as a community. The demand for great games is still growing. Ours is the opportunity to deliver to that demand. Envision a future where instead of fewer, bigger games, there are more innovative games, more creative games and more variety in games.

The massive online migration adds a really interesting component. It is different than any other industries' similar migration. Whether I buy my music from iTunes, or listen to it on Pandora, or ▶

even if I still listen to vinyl, my experience as a listener is linear. Same for movies or TV – these are all start-to-finish experiences.

Not so for games. The online components fundamentally alter our experience and the design of the media we consume with games. Episodic, social gaming, micro-transactions, cooperative play are all in various stages of evolution and sure to continue to evolve significantly.

These elements not only change design, but also development processes, costs, business models and how we define fun.

A new level of investment in creativity and experimentation is at hand. We are in a perfect storm of pressures driving us to these new levels. The flip side to the pressures is very exciting to watch. Hundreds of new studios are forming all over the world with exciting ideas about process, technology, gameplay and/or business models. Every publisher I talk to is looking to change the status quo whether by choice or by need. I believe that our industry will work through this period and come out the other side more powerful, creative and central to the lives of mainstream culture. A virtual explosion of creativity is about to occur and it is going to be a wild ride.

Hundreds of new studios are forming all over the world with exciting ideas about gameplay and how we define fun

We are creating new forms of entertainment – entertainment that prior generations couldn't even conceive of, but that this generation can't conceive of living without. We are changing the way people work and play. Soldiers, teachers, doctors and architects are using our technology to transform our world. Just a few years ago, words like social networking didn't exist. Multiplayer games bringing people together across the planet and across generations to form 'guilds' for 'raids' was the stuff of science fiction. Where do you want to go? We are taking you there!

We are learning new ways to think. The kids driving this industry today are literally wired differently because of how they play and socialise. What they invent will wildly surpass the achievements of this past generation. We are changing, as an industry, as society, as a species because of what we are all doing. Something new is emerging from a vast community of developers. We call it the new face of triple triple-A. It moves at the speed of light. We at Emergent are truly proud to be a part of it.

Once again, congratulations to the *Develop 100* this year. We implore all of you to come play some more next year. It will be our honor to work together, and invent what's next!

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01 BLIZZARD ENTERTAINMENT

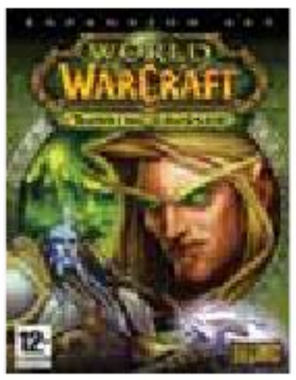
STATISTICS

Founded:
1994

Owned by:
Activision Blizzard

Head count:
2,700

KEY RELEASE



World of Warcraft is a truly global phenomenon. It is available in eight languages, and in 2008 launched in Russia and South America.

COUNTRY:

California

CONTACTS

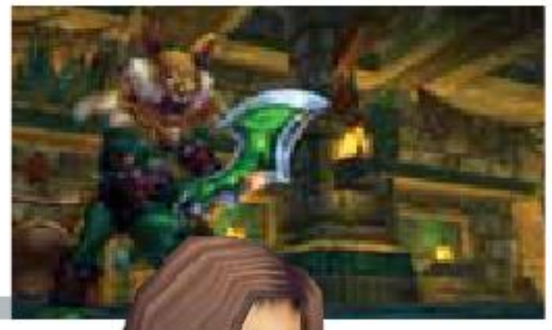
Address: P.O. Box 18979, Irvine, CA 92623, USA

www.blizzard.com

FAST FACT

16m

The number of quests completed by World of Warcraft players every single day



STUDIO PROFILE

Wow! *WoW*! Launched back in November 2004, Blizzard's appropriately acronym-ed *World of Warcraft* continues to do the sort of numbers previously reserved for crime syndicates and smaller members of the United Nations – now over $100 million a month from subscriptions alone.

It's not just the monthly revenues that impress, either – although they are incomparable, and the principle reason for Blizzard's 46 place jump up our recalibrated chart. The late 2008 release of *World of Warcraft*'s second expansion pack, *Wrath of the Lich King*, also put all but a handful of rival titles into the shade.

Hitting the shops last November, *Wrath of the Lich King* sold 2.8 million copies within 24 hours and four million in a month – enough to make it the fastest-selling PC game of all time (a record hitherto held by the previous expansion pack, *The Burning Crusade*).

Blizzard delivered $1.34 billion to Activision-Blizzard's bottom line last year. Thanks to *Guitar Hero* and *Call of Duty*, the Activision side of the family raked in $2.15 billion, which might make Blizzard seem the weaker partner. But Blizzard generated revenues of $1.1 billion in 2007, and $638 million back in 2006, dwarfing pre-merger Activision's income. Barring nuclear Armageddon, Blizzard will take well over $1 billion this year, too.

The cost to keep World of Warcraft turning is hefty. The company employs 250 people in game development, but the total global heacount is likely ten times that number.

Such is the power of *World of Warcraft*'s subscription base. *The Wrath of the Lich King* helped pull in a new batch over Christmas, and *WoW* ended the year with 11.5 million.

The cost to keep *World of Warcraft* turning is hefty. According to Blizzard, the company employs 250 people in game development, but the total global headcount is likely ten times that number. Analysts were advised in September that it all added up to around $200 million since launch, with the bulk spent on customer support.

Yet that still leaves literally billions to spend on new titles – the company is working on *Diablo III* and not one but three *Starcraft II* releases, as well as a new MMO – and spare change to contract *Lord of the Rings* special effects house WETA to build a 12-foot high WoW statue for the company's Irvine, California offices.

But you can never have too much money. Besides the upcoming new games, a *World of Warcraft* movie is in development, Blizzard signed an ad deal with Massive for Battle.net, a WoW-themed restaurant opened in Beijing, and Blizzard even introduced a new $15 sex change facility to *WoW*.

Peanuts? Hardly. If a million subscribers decide to explore their feminine side…

02

NINTENDO EAD

STATISTICS

Founded:
1947

Owned by:
Nintendo

Head count:
1,400+

KEY RELEASE

Wii Fit sold over a million copies in Japan within little over a month of its December 2007 release date. But Nintendo struggled to keep up with demand in the rest of the world during 2008.

COUNTRY:

Kyoto

CONTACTS

Address: 11-1, Kamitoba hokotate-cho, Minami-ku, Kyoto 601-8501, Japan

www.nintendo.co.jp

FAST FACT

96m

The lifetime sales of Nintendo DS by the end of 2008. Tens of millions of new DS owners meant a ravenous demand for Nintendo's DS back catalogue

3 Boiling the lasagne
1 Boil 2 sheets at a time
Once the water has come to the boil, add the lasagne and boil it 2 sheets at a time.

STUDIO PROFILE

Such is the depth of Nintendo's back catalogue that it would occupy this position even if it hadn't released any new games in 2008, on the strength of its DS games alone. Nintendo-developed DS games like *Mario Kart DS, Brain Training, Nintendogs* and *New Super Mario Bros* each saw sales of three to four million units over the course of 2008. All but *Super Mario* were released in early 2005.

It may seem strange to start Nintendo's entry in the *Develop 100* talking about old games, but we wish to emphasise the extraordinary durability of Nintendo's games and franchises. Where other publishers have been recently expressing surprise at the shelf-life of some of their titles (particularly casual games, as well as hardcore best-sellers kept fresh with downloadable content), for Nintendo that's business as usual.

2008 saw the release of some huge Wii games created by Nintendo's internal development resource, but the real story is that its games will still be selling well in 2010. When it comes to multi-product game development – and despite rivals benchmarking and name checking the Kyoto-based company for years – Nintendo remains in a class of its own.

Disregarding *Wii Sports*, the 40-million seller that has been bundled with the Wii console everywhere except Japan since launch, Nintendo's biggest game of the year was a toss-up between *Wii Fit* and *Mario Kart Wii*. The latter, bundled with the Wii Wheel accessory, sold 13 million copies in 2008, and was well-received by reviewers.

When it comes to multi product game development – and despite rivals benchmarking and name checking the Kyoto-based company for years – Nintendo remains in a class of its own.

Wii Fit also sold well over ten million units in 2008, and with its higher retail price and envelope-pushing gameplay it was Nintendo's key release of the year. Sales could almost certainly have been higher, too. Consumers left their couches in droves to buy the fitness-based game, resulting in periods where the game sold out at key retailers in the UK and US.

And there's more. *Wii Play*, which is bundled with a Wii Remote, was the best-selling game in North America in 2008, where it sold over five million units. It shifted around ten million worldwide. *Animal Crossing: City Folk* sold more than three million units, and *Wii Music* 2.5m, though neither game was particularly highly-rated by reviewers.

The stellar *Super Mario Galaxy*, which enjoyed unanimous adulation from critics on release in late 2007, also kept selling to reach 7.6m in lifetime sales. The fact that such a lavishly garlanded game is being outsold by more modestly rated, yet much more accessible, titles tells you much about why other publishers have been scrambling to release casual Wii games during the past 12 months.

03

ROCKSTAR NORTH

STATISTICS

Founded:
1988

Owned by:
Rockstar North

KEY RELEASE

GTA IV was the first console game in the series to feature an online mode. It was overshadowed by the single-player narrative, however, and multiplayer remains one aspect where Rockstar North hasn't yet trounced its competition.

COUNTRY:

Edinburgh

CONTACTS

Address: Carlton Square, 1 Greenside Row, Edinburgh, EH1 3AP, UK

www.rockstarnorth.com

FAST FACT

$710m

The total revenues generated for Take Two by the GTA franchise in 2008

STUDIO PROFILE

Just one game was enough to put Rockstar North into the number three position of the *Develop 100*, but what a game. Very few releases have been more commercially successful than *Grand Theft Auto: IV*, and has any third-party title ever achieved such universal acclaim? *GTA: IV* is the highest-ranking release by some distance on both Xbox 360 and PlayStation 3, according to the review aggregation sites, rated 98 on both platforms on *Metacritic*.

Sticking one in the eye of every publishing insider who has sniffed at such high review scores, *Grand Theft Auto: IV* sold 3.6 million on its April 29th 2008 release date, and had shifted six million (or $500 million worth) by the end of its first week of release. Take Two says it had shipped 13 million copies as of January.

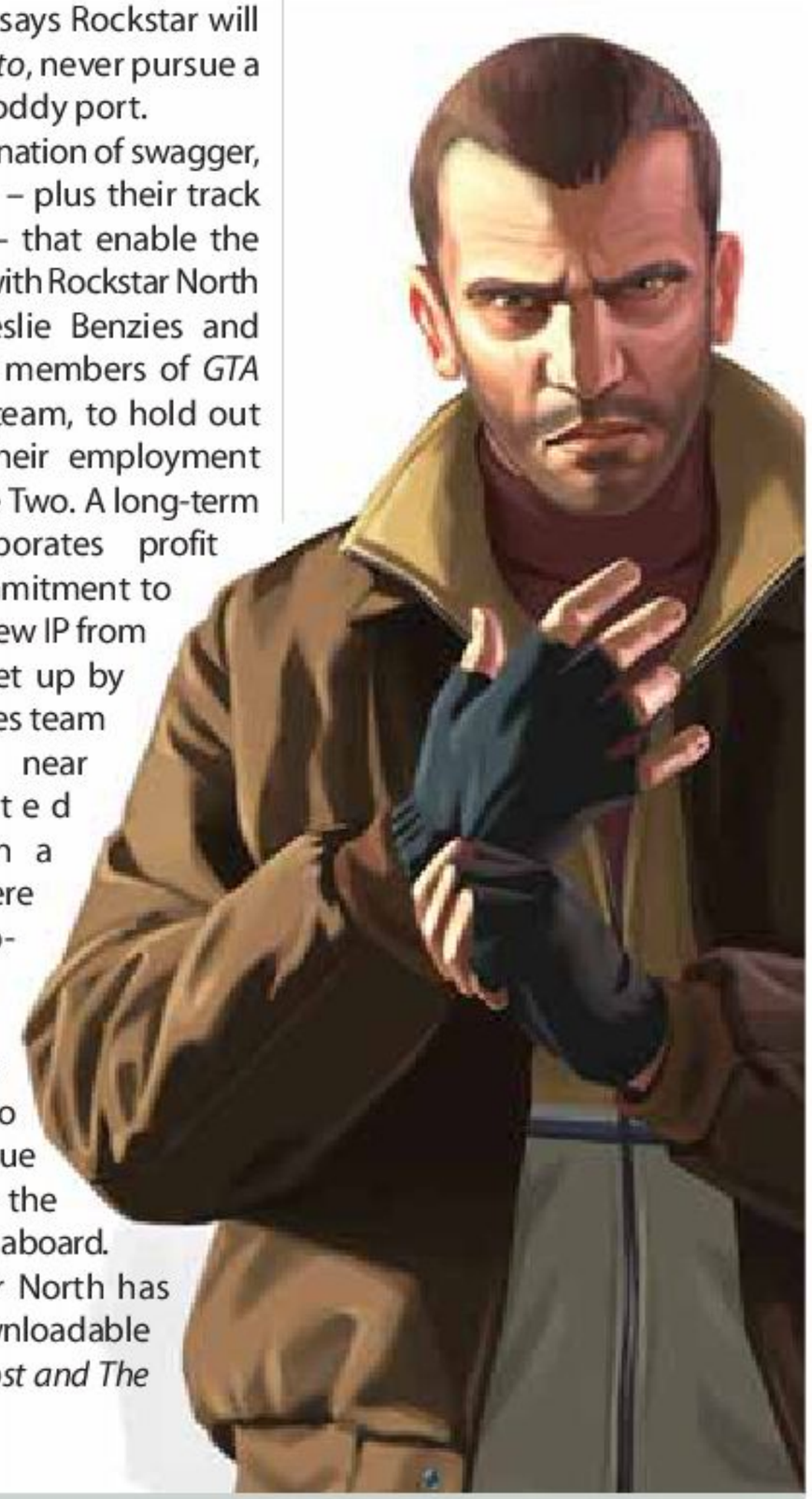
Lauded by everyone from university professors and op-ed writers to fellow boundary-pushing Brit developer Peter Molyneux as a significant breakthrough for storytelling and the medium, it's hard not to suspect that *GTA IV* will mark a high water point for the series and its creator.

But the Edinburgh-based dystopian dream factory and its guiding lights and Rockstar label founders, Dan and Sam Houser, have long walked even better than they talked. EA says it's putting more focus on quality across its *Need for Speed* franchises, and then releases *Undercover*, which only just scrapped a pass. Dan Houser says Rockstar will never compromise *Grand Theft Auto*, never pursue a cheap movie tie-in nor allow a shoddy port.

A combination of swagger, clout and scruples – plus their track record – enabled the Housers, together with other key members of the GTA team, to hold out when renewing their contracts with Take Two.

It was this combination of swagger, clout and scruples – plus their track record, of course – that enable the Housers, together with Rockstar North studio director Leslie Benzies and other cornerstone members of *GTA IV*'s development team, to hold out when renewing their employment contracts with Take Two. A long-term agreement incorporates profit sharing and a commitment to fund and publish new IP from a new company set up by 'key Rockstar Games team members'. A near unprecedented agreement, but in a world where Harmonix co-founders are paid $150m earnings in related fees years after selling out to Viacom, we'd argue Take Two got the better end of the bargain to keep the Housers and Co. aboard.

Since *GTA: IV*'s release, Rockstar North has officially been working on two downloadable episodes (the first of which, *The Lost and The Damned*, arrived in February).



04 EA CANADA

STATISTICS

Founded:
1992

Owned by:
Electronic Arts

KEY RELEASE

The Xbox 360 and PS3 versions of FIFA 09 feature user-controlled goal celebrations – a first for the series. The developers might have loaded a few up when Christmas 2008's sales figures came in.

COUNTRY:

Vancouver

CONTACTS

Address: 4330 Sanderson Way, Burnaby, British Columbia V5G 4XI, Canada

www.ea.com

FAST FACT

7.8m

Total sales of FIFA 09 across all formats in the last quarter of 2008

STUDIO PROFILE

While it's unlikely any division will entirely escape the long arm of EA management's escalating lust for redundancies (current ambition – 1,100 staff must go) EA Canada might take some security in the fact it delivered EA's best-selling title of 2008, *FIFA 09*.

Sure, the global appeal of football makes the franchise even more magnetic than EA's *Madden* series, but *FIFA 09* reviewed well across its many formats, too. And while it may stick in the craw in some quarters that Europe's national sport is rendered in best-selling digital form by a Canadian company (when it's not being done by the Japanese), it's worth noting the lead producer of the Xbox 360 and PS3 versions, Dave Rutter, is a Brit. Indeed, while we've not seen official figures to put numbers on the theory, we'd imagine EA Canada's workforce is as cosmopolitan as the Starship Enterprise.

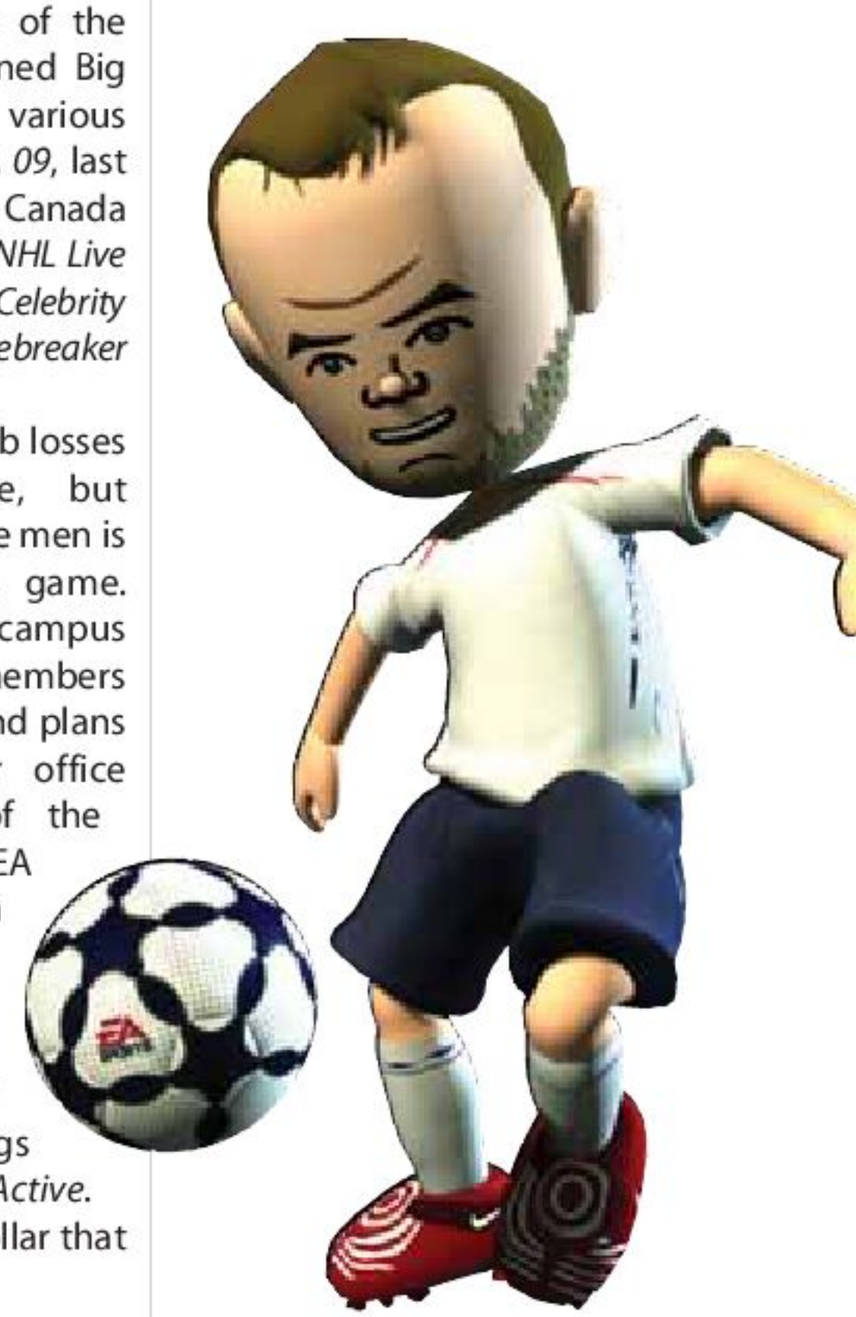
The attractions are obvious. Besides the chance to work on stalwart EA Sports brands, the main EA Canada studio is located in the British Columbian suburb of Burnaby, just to the east of quality-of-life superstar Vancouver. EA's largest campus sprawls across 400,000 square feet, and boasts its own volleyball and basketball courts, a football pitch (or 'soccer' pitch in EA Canada-speak), gym and theatre, as well as extensive multimedia toys and work spaces. Before the job cuts began it was home to at least 1,700 staff – more than many a rural Canadian village.

Rumours of job losses still occasionally surface, but we think that EA Canada's campus will remain among the busier places for the publisher's employees in 2009.

While EA Canada has taken the occasional diversion, such as the Wii version of *Medal of Honor: Heroes 2* (released in Europe in 2008), it's really all about the sports. The studio's CV includes most of the games in EA's now quietened Big label, such as *SSX* and the various *Street* titles. Aside from *FIFA 09*, last year was also graced by EA Canada developed *NBA Live 09* and *NHL Live 09*, Freestyle brand launcher *Celebrity Sports Showdown* on Wii, *Facebreaker* and *UEFA Euro 2008*.

Rumours of EA Canada job losses still occasionally surface, but following the trail of EA's axe men is an unrewarding guessing game. With the Burnaby campus welcoming the surviving members of the EA Black Box team and plans for a second Vancouver office reversed in the light of the cutbacks, we think EA Canada's campus will remain among the busier places for employees in 2009.

Those staff are currently employed on a raft of titles including the usual annual sports iterations, plus less regular outings such as *Fight Night Round 4* and *EA Sports Active*. And you can bet your bottom Canadian dollar that *FIFA 10* is half done already.



05 CAPCOM

STATISTICS

Founded:
1979

Owned by:
Capcom

Head count:
1,200+

KEY RELEASE

Devil May Cry 4 is familiar territory for fans of the series, albeit with a significant cosmetic upgrade since Devil May Cry 3 on PlayStation 2.

COUNTRY:

Osaka

CONTACTS

Address: 3-1-3 Uchihirano-machi, Chuo-ku, Osaka 540-0037, Japan

www.capcom.co.jp

FAST FACT

40m

Total lifetime shipments of Capcom's Resident Evil series, as of March 2009

STUDIO PROFILE

Daring to develop new IP has paid off for Capcom. Whereas certain Japanese rivals have failed to recreate the glory days of yesteryear on the back of yesteryear's games, Capcom has better balanced its prestigious back catalogue – bulging with *Street Fighter, Resident Evil, Mega Man* and more – with new properties.

Unlike some of its Japanese peers, it's also kept a weather eye on Western tastes, which have become increasingly important as domestic demand has dried up.

It's somewhat ironic then that Capcom's most successful new IP has sold so well at home. The likes of *Lost Planet* and *Dead Rising* – released in 2006 – both shifted well over a million units, earning their sequels now in development.

But they hardly compare to the mighty *Monster Hunter*.

First debuting just five years ago on PS2, *Monster Hunter* has become a phenomenon in Japan, where later sequels have saved the PSP almost single-handedly. As of December 2008, the *Monster Hunter* series had sold 8.5m sales collectively over its lifetime, and Capcom recently named the brand its leading franchise – ahead of the likes of *Resident Evil*.

Monster Hunter Freedom 2G was released in March 2008. It sold one million in less than a week and became the first Japanese software title to sell two million units, an achievement that took it barely three months.

Another massive seller for Capcom in 2008 was *Devil May Cry 4*, the latest instalment of the *Devil May Cry* series first launched in 2001. Helped by a very credible 84 rating on *Metacritic*, *Devil May Cry 4* has gone on to sell over two million copies across Xbox 360, PS3 and PC as the first true multiformat release for the series.

Capcom's stated ambition is to exploit properties across multiple media – as well as taking them to new hardware – through its 'Single Contents Multiple Usage' strategy.

Taken collectively, the *Devil May Cry* games have sold more than 10 million units, and *Devil May Cry 4* is also being translated to other media including comics, an anime and a novel due in 2009. Capcom's stated ambition is to exploit more properties across multiple media like this – as well as taking them to new hardware – through its 'Single Contents Multiple Usage' strategy.

Capcom's thinking, which mirrors Western rival EA's recent direction, has been buoyed no doubt by the commercial success of the three *Resident Evil* movies, which together have generated revenues of $300m. The CGI movie, *Resident Evil: Degeneration*, has sold well too – over 1.5 million copies since its release at the very tail end of 2008.

06 UBISOFT MONTREAL

STATISTICS

Founded:
1997

Owned by:
Ubisoft

Head count:
1,850

COUNTRY:

Quebec

CONTACTS

Address: 500 boul Saint-Laurent, Suite 5000, Montreal, H2T 1S6, Quebec, Canada

www.ubisoftgroup.com

KEY RELEASE

As development shifted from series originator Crytek to Ubisoft Montreal, Far Cry 2 also saw a shift in the action, from tropical paradise to the plains of East Africa.

There was no new *Assassin's Creed* – although Ubisoft upped its sales forecast for that late 2007 smash by two million in January 2008, as the game kept selling – but a development complex of over 1,850 souls never rests.

Standing out among its new releases were *Far Cry 2*, *Tom Clancy's Rainbow Six: Vegas 2*, *Shaun White Snowboarding* and *Prince of Persia*. The latter was praised for its eye candy, but traditionally tougher scorers marked it down. *Far Cry 2* did better, selling 2.9m over the crucial Christmas period, and Wii-Balance Board compatibility helped *Shaun White Snowboarding* sell particularly well on Wii.

While Ubisoft's global footprint ever expands, the Montreal team is expected to remain pivotal, with plans to grow the studio's headcount to 3,000 – helped in part by the Quebec government's tax credits and other financial incentives.

FAST FACT

4,350

Ubisoft's global development roster, out of a total staff of 5,450 (as of December 2008)

TREYARCH

07

STATISTICS

Founded:
1996

Owned by:
Activision

KEY RELEASE

Treyarch's expansion packs for Call of Duty: World at War for Xbox 360 and PlayStation 3 have got 2009 off to a great start for the studio. The first pack sold a million units in a week.

FAST FACT

35m

Collective sales of games in the Call of Duty series since its launch in 2003, as of December 2008

COUNTRY:

California

CONTACTS

Address: 100 N. Sepulveda Blvd, Suite 1100, El Segundo, CA. 90245, USA

www.treyarch.com

While *Call of Duty: World at War* didn't quite live up to the critical adulation accorded to its predecessor, by any normal measures it was judged an excellent title on all the formats Treyarch was responsible for – Xbox 360, PS3, Wii and PC. The return to World War II certainly didn't hurt sales, either. *World at War* sold nearly six million copies worldwide in 2008, making it the fifth best seller of 2008 and enough to place the Santa Monica developer very firmly towards the top of our list this year.

The Activision studio's other release of 2008, *Quantum of Solace*, didn't match *World at War*'s critical reception or its sales. Review scores weren't terrible though – merely middling – and the Bond licence will surely have helped the Santa Monica studio's PS3 and Xbox 360 versions get well beyond the million mark.

08 INFINITY WARD

STATISTICS

Founded:
2002

Owned by:
Activision

Head count:
100

COUNTRY:

California

CONTACTS

Address: 15821 Ventura Boulevard Suite 590 Encino, CA 91436, USA

www.infinityward.com

KEY RELEASE

Call of Duty 4: Modern Warfare (and its associated DLC) sold well in 2008, and it is still winning awards, picking up three BAFTAs in March 2009.

FAST FACT

15m

The total number of unique users who have been logged playing Call of Duty 4: Modern Warfare via Xbox Live and PlayStation Network

Californian superstar developer Infinity Ward makes *Call of Duty* games. Its last, *Call of Duty 4: Modern Warfare*, was the best-selling game of 2007. The studio hasn't released another game since then. So what's it doing in the *Develop 100*?

Well, nobody told *Call of Duty 4* the war was over. The game carried on shifting in huge numbers. As of March 2009 it has sold 12m copies – five million of which changed hands in 2008 and early 2009.

According to Infinity Ward, *Call of Duty 4*'s performance makes it the number one shooter of all time, and the second best-selling game ever.

Then there's the downloadable content. April 2008 saw its Variety Map Pack hurdle the million paid download mark on Xbox Live after just nine days on sale, generating another $10 million.

Infinity Ward is now working on *Modern Warfare 2*, which drops the Call of Duty prefix.

EPIC GAMES

09

STATISTICS

Founded:
1991

Independent

Head count:
100

COUNTRY:

North Carolina

CONTACTS

Address: 620 Crossroads Blvd, Cary, NC 27518, USA

www.epicgames.com

KEY RELEASE

Besides lauding its spectacular visuals, reviewers found Gears of War 2 an even more involving game than the original, with more interesting character and environmental interactions, and a deeper narrative.

FAST FACT

2m

The unit sales of Epic Games' Gears of War 2 achieved on its opening weekend

While rival engine licensing middleware companies construct arguments about the drawbacks of a developer licensing its own engine, Epic Games continues to get on with doing both with phenomenal success. The engine that powers everything from EA's *Mirror's Edge* to Midway's *Mortal Kombat vs DC Universe* also made for a beautiful backbone to *Gears of War 2*, the company's all-conquering sequel, released November 2008.

The 360 exclusive sold four million copies within two months of release – twice the sales pace of the original title. Designer Cliff Bleszinski says *Gears of War 2* is more 'a platform' than a conventional release, thanks to extensive online modes, and fans have enjoyed a steady supply of DLC since its release.

2008 saw Epic acquire Utah's Chair Entertainment. It also struck an unnamed game development deal between Polish subsidiary People Can Fly and EA.

10 BETHESDA SOFTWORKS

STATISTICS

Founded:
1986

Owned by:
ZeniMax Media

KEY RELEASE

Dystopia looks beautiful in Fallout 3, and it sounds great, too, with the game working in 20 licensed songs from the 1940s.

FAST FACT

ZERO

The amount of downloadable content released for Fallout 3 on PlayStation 3. Analysts speculate that Microsoft has paid Bethesda to keep the DLC Xbox exclusive

COUNTRY:

Maryland

CONTACTS

Address: 1370 Piccard Drive, Suite 120, Rockville, MD 20850, USA

www.bethsoft.com

If Bethesda Softworks has had several hot and cold periods during its 25 years in existence, then the current era is positively nuclear. Following 2007's much-lauded and commercially unstoppable *Elder Scrolls: Oblivion*, which it produced for 2K Games, it returned to self-publishing with *Fallout 3*.

Long-time fans of series developer Black Isle Studios fretted. But the game, positioned 36 years along the post-apocalyptic timeline established in previous *Fallout* games and realized in full 3D for the first time – thanks to the Emergent-created Bethesda favourite Gamebryo engine – proved a hit with the critics, and won over millions of new fans.

Bethesda shipped 4.7 million copies worldwide for Xbox 360, PC and PlayStation 3 for the global launch. By January this year, the Xbox 360 version had sold over a million units and the PS3 version half a million in the North American market alone.

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Producer, DICE

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Lead Animator, Starbreeze

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Lead Animator, IO Interactive

KONAMI

STATISTICS

Founded:
2006 (from a merger of various Konami studio teams)

Owned by:
Konami Entertainment

Head count:
5,000+

COUNTRY:

Tokyo

CONTACTS

Address: 9-7-2 Akasaka, Minato-ku, Tokyo, 107-8323, Japan

www.konami-digital-entertainment.com

KEY RELEASE

Pro Evolution Soccer 2009 included a Become A Legend mode, which follows a single player's career like the Be A Pro mode of rival EA. But reviewers felt the series had fallen behind the pace elsewhere.

FAST FACT

40

The years served (so far) by Konami CEO Kagemasa Kozuki, who founded the company as a jukebox rental and repairs business in Osaka, Japan in 1969

The *Pro Evolution Soccer* series no longer enjoys any clear advantage in the review leagues over *FIFA 09*. Released in Europe in October and the US in November across all the formats, *Pro Evolution Soccer 2009* on PlayStation 3 for example achieved a *Metacritic* rating of just 77, versus 87 for the current *FIFA* release. The Xbox 360 version fared even worse.

Many reviewers argue that *Pro Evolution Soccer* is due a bottom-up overhaul, and some have even suggested that *FIFA 09* is now the deeper football sim and *PES 2009* the pick-up-and-play pretender.

Nevertheless Konami's take on the beautiful game sold to its usual millions of admirers, and older titles shifted in their millions before its release, too. For now *PES* remains one of the very few pure sports games that can give EA a run for consumers' money.

Pro Evolution Soccer 2010 has just been announced as in development.

TRAVELLER'S TALES

12

STATISTICS

Founded:
1989

Owned by:
Warner Bros.

Head count:
270

COUNTRY:

Cheshire

CONTACTS

Address: Canute Court, Toft Road, Knutsford, Cheshire, WA16 0NL, UK

www.ttgames.com

KEY RELEASE

LEGO Batman follows the template established by the smash hit LEGO Star Wars games, but adds even more camp humour and pays closer attention to character skills.

FAST FACT

15m

The lifetime sales of the Traveller's Tales developed LEGO Star Wars franchise, according to president Jon Burton

Time Warner paid an estimated $200 million for Traveller's Tales owner TT Games in late 2007, and the payback came quick in 2008. Its two key releases over the year, *LEGO Indiana Jones* and *LEGO Batman*, were cited in Time Warner's 2008 financials as having partially offset declines elsewhere at the entertainment behemoth.

The all-format *LEGO Batman* will have been particularly beneficial, with all revenues going to Warner Bros, as opposed to *Indy* where the spoils were shared with LucasArts.

The same logic underwrites speculation that Warner-owned *Harry Potter* will get the LEGO treatment next, as well as another *LEGO Indy* title. As we go to press, the studio has announced a Harmonix partnership to make *LEGO Rock Band*.

Also confirmed for 2009 is a DS title, *LEGO Battles*. The company is also exploring children's TV.

13 SEGA STUDIOS JAPAN

STATISTICS

Founded:
1960

Owned by:
Sega Sammy

KEY RELEASE

Mario & Sonic at the Olympic Games has been a massive hit for Sega, and the company will be banking on a repeat performance when the sequel arrives ahead of the Vancouver Winter Olympics.

FAST FACT

50m

The total number of Sonic-branded games sold, as of 2008

COUNTRY:

Tokyo

CONTACTS

Address: 1-2-12 Haneda, Otaku, Tokyo 144-8531, Japan

www.sega.jp

Sega looked certain to become a top multiplatform developer and publisher when it withdrew from hardware, but it's not worked out like that. Internal restructuring means we now feel it's best to group most of Sega's branded studios together, but the subsequent jump in position reflects scale and the success of just one title.

Released in 2007 but selling well throughout 2008, *Mario & Sonic at the Olympic Games* is the best recent title to star Sega's mascot. It has now shifted ten million titles worldwide. Other Sonic outings such as *Sonic Riders: Zero Gravity* and *Sonic Unleashed* scored badly with reviewers. *Iron Man* and *Golden Axe* releases by Sega's San Francisco-based studio were poor. UK-based Sega Racing Studio was sold mid-2008.

Mario & Sonic at the Olympic Winter Games arrives later this year.

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14 LUCASARTS

STATISTICS

Founded:
1982

Owned by:
LucasFilm Entertainment

COUNTRY:

California

CONTACTS

Address: LucasArts, P.O. Box 29908, San Francisco, CA 94129-0908, USA

www.lucasarts.com

KEY RELEASE

LucasArts partnered closely with sister company and office roommates Industrial Light & Magic in developing the tools behind The Force Unleashed.

FAST FACT

5.7m

Total sales of The Force Unleashed across all platforms, as of February 2009

2008's *Star Wars: The Force Unleashed* was a multimedia project with ambitions worthy of the world's most enduring brand.

LucasArts' internal studio contributed PS3 and Xbox 360 versions; they were fairly well received, a flawed targeting system being weighed against a franchise-expanding plot that picked up a Writers Guild of America award. *The Force Unleashed* is now the best-selling *Star Wars* game ever.

Elsewhere, the developer's new sister studio, LucasArts Singapore, debuted with *Star Wars: The Clone Wars – Jedi Alliance* for DS.

There was a Dark Side, though – San Francisco-based LucasArts shed some 100 jobs in summer, and rumours that internal development would cease persisted. Officially, the team has been working on DLC for *The Force Unleashed*, while insiders talk about another *Star Wars* game.

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DTP: Text-flow, layout, font management

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15 NEVERSOFT

STATISTICS

Founded:
1994

Owned by:
Activision

Head count:
150

COUNTRY:

California

CONTACTS

Address: 20335 Ventura Blvd, Suite 320, Woodland Hills, California, 91364, USA

www.neversoft.com

KEY RELEASE

Guitar Hero World Tour added drums and microphone controllers to take on Harmonix's Rock Band. It's like the Beatles versus the Stones all over again.

FAST FACT

40%

The uplift Aerosmith saw in its back catalogue sales following the release of Guitar Hero: Aerosmith

The game that brought air guitaring out of the bedroom continues to do well not just for owner Activision, but developer Neversoft, also famed for its work on the *Tony Hawk* series.

2007's *Guitar Hero III: Legends of Rock* sold throughout 2008; by January 2009 *Guitar Hero* publisher Activision Blizzard announced *Legends of Rock* had become the first single video game to surpass $1 billion in sales.

Summer 2008's *Guitar Hero: Aerosmith* provided an envelope-pushing encore, selling one million copies in less than three months, and prompting Activision CEO Bobby Kotick to claim the game had made more money for the band than any album.

Then in October Neversoft turned the brand's 2008 up to 11, with *Guitar Hero World Tour* selling 3.4 million copies in North America alone.

Tony who?

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16 SORA

STATISTICS

Founded:
2007

Owned by:
Nintendo

COUNTRY:

Tokyo

CONTACTS

Address: 7-2, 2-chome, Fujimi, Chiyoda-ku, Tokyo, Japan

www.project-sora.co.jp

KEY RELEASE

Super Smash Bros. Brawl features 35 selectable characters, largely drawn from the massed ranks of Nintendo mascots past and present but also including Solid Snake and Sonic the Hedgehog.

FAST FACT

93%

The MetaCritic score achieved by Super Smash Bros. Brawl. It's the fourth highest rated game for Wii

Few companies enjoy the success Sora found with its debut release, the blockbusting *Super Smash Bros. Brawl*. Released in early 2008, the Wii title had sold over eight million copies by September.

Perhaps that's not surprising given that company founder, Masahiro Sakurai, a former employee of the Nintendo second-party specialist HAL Laboratory, was also director of the previous two *Super Smash Bros.* games (and he can also claim Nintendo poster-blob *Kirby* on his CV).

But 2009 sees something of a twist. In January, Sora and Nintendo founded a new 30-strong company, Project Sora, with Nintendo taking a 72 per cent stake. And Sakurai-san has promised Project Sora's first title will definitely not be a *Super Smash Bros.* game, but rather something wholly original. We wait with baited breath.

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17 KOJIMA PRODUCTIONS

STATISTICS

Founded:
2005

Owned by:
Konami Entertainment

Head count:
200

COUNTRY:

Tokyo

CONTACTS

Address: 9-7-2 Akasaka, Minato-ku, Tokyo, 107-8323, Japan

www.konami.jp/kojima_pro/

KEY RELEASE

Metal Gear 4: Guns of the Patriots achieved full marks from dozens of websites and publications, including the Official PlayStation Magazine in the UK and US, and IGN and Gamespot.

FAST FACT

77,208

PS3 console sales in Japan in the week of MGS4's release, up from a more typical 10,000, according to Famitsu

Hideo Kojima reportedly received death threats when he said he might not directly lead development on *Metal Gear Solid 4*.

Having relented to become co-producer and designer, he clearly didn't let his 200-strong team take any shortcuts – the result was the pinnacle of the 21 year-old series, winning nearly universal acclaim and being lauded by some as the saviour of PlayStation 3.

With three million units shipped worldwide in its first few weeks on sale, total sales of *MGS4* have now surpassed 4.5 million.

This success was topped off by the launch of *Metal Gear Online*, a distinct online offering bundled with the game in North America and Europe. The service had achieved a membership of one million before 2008 was out, and has seen the release of several relatively premium priced expansion packs.

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18 MEDIA MOLECULE

STATISTICS

Founded:
2006

Independent

Head count:
30

COUNTRY:

Guildford

CONTACTS

www.mediamolecule.com

KEY RELEASE

LittleBigPlanet's community has made over four million comments on game levels, representing an unprecedented channel between a console game's audience and the content creators.

FAST FACT

725,000

The number of LittleBigPlanent levels created by its community of two million players as of April 2009

Who said a start-up studio can't debut with a blockbuster anymore? The crew behind Media Molecule are hardly industry virgins (key founders Mark Healey and Alex Evans hail from Lionhead) but they still had to win their Sony deal, and deliver on the *LittleBigPlanet* buzz.

Few would suggest the 30-strong developer didn't triumph. Its PS3 game is a posterchild for user-generated content and a darling of the press, enjoying a spectacular 95 *Metacritic* rating, plus a BAFTA win for Artistic Achievement.

Sales haven't been spectacular, however. Sony revealed in April that there were nearly two million unique *LittleBigPlanet* players in its online community, pointing to sales modestly north of that figure.

Format exclusivity is a mixed blessing; the PSP version being created in conjunction with Sony Cambridge will help.

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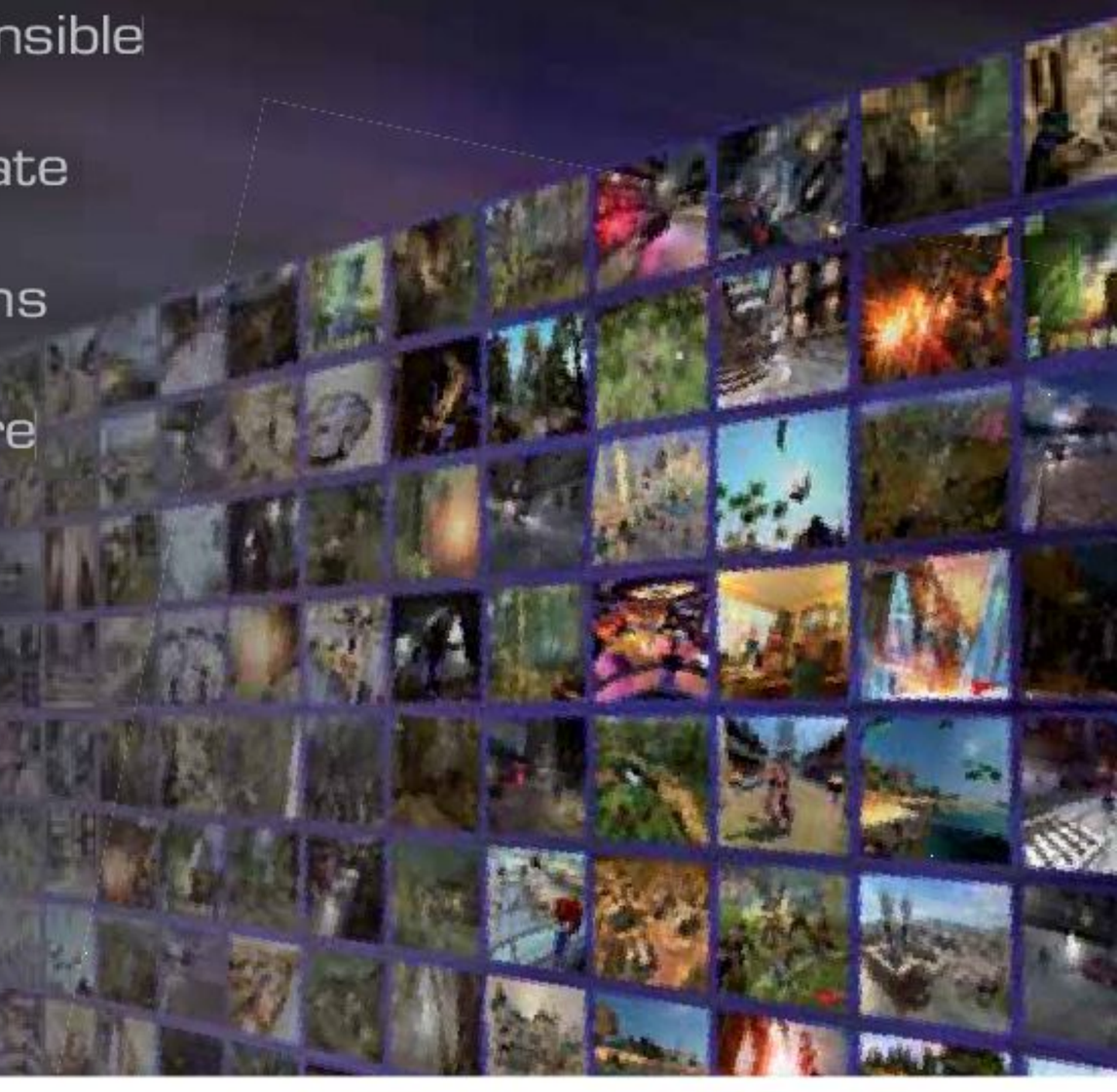

Wii WiiWare PLAYSTATION 3 XBOX 360 XBOX LIVE ARCADE Games for Windows

19 NEXON

STATISTICS

Founded:
1994

Owned by:
Nexon Corporation

COUNTRY:

Seoul

CONTACTS

www.nexon.com

KEY RELEASE

Mabinogi (the word is of Welsh origin) is an MMO with an emphasis on crafting and village life as much as on WoW-style raids and dungeon romps.

FAST FACT

$30m

The revenues generated by Nexon selling virtual goods to US gamers in 2007 across all its titles

A new name on the list and probably to some readers, but not to its 350 million subscribers worldwide, Nexon is the big beast of South Korea's games industry, and a pioneer in free-to-play gaming games by micro-transactions.

Before you turn back to Activision Blizzard, know that Nexon's 2007 revenues (the last full year's figures available) were $300m, and that 16 million South Koreans have subscribed to its racing game *Kart Rider*. That's one third of the population!

Nexon has been spreading its tentacles further; MMO *MapleStory* is doing well in North America on the back of pre-paid vouchers, for instance.

Many of Nexon's games are developed externally – including *MapleStory* and the increasingly popular first-person shooter *Combat Arms* – but *Mabinogi*, launched in the US in March 2008, is like *Kart Rider*, a Nexon production.

EA BLACK BOX

20

STATISTICS

Founded:
1983

Owned by:
Electronic Arts

COUNTRY:

Vancouver

CONTACTS

www.eablackbox.com

KEY RELEASE

As well as the usual consoles and handhelds, Need for Speed: Undercover was released for mobile, iPhone, N-Gage and Windows Pocket PCs. It's also the swansong for the series on PlayStation 2.

FAST FACT

50m

The number of EA Black Box developed games sold in the past five years, according to the company's website

Staff at EA Black Box must have grown uncomfortably used to the gaze of the spotlight – well, those that are left.

The summer of 2008 saw EA CEO John Riccitiello admitting the publisher had 'tortured' the *Need for Speed* developer in the past with a 12 month treadmill of releases, and said future games in the franchise would be better for a two-track, 18 month development cycle.

Commercially the next one out, *Need for Speed: Undercover*, was a huge hit. Helped by being available on everything bar your toaster, *Undercover* has now sold over five million copies. But reviews were poor, and 2009 saw big redundancies at Black Box.

Having shipped the excellent *Skate 2* in January, Black Box's remaining staff are working on free-to-play *Need for Speed: Online* (with EA Singapore) and an unnamed futuristic *Need for Speed* title.

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VALVE 21

STATISTICS

Founded:
1992

Independent

Head count:
160

Contact: 10500 NE 8th Street, Suite 1000, Bellevue, MA 98009, USA

www.valvesoftware.com

KEY RELEASE

For Left 4 Dead, Valve made great use of third-person cut-scenes, in keeping with the game's central cinematic conceit

2008 saw Valve successfully add the zombie-themed irony-fest *Left 4 Dead* to its treasure chest of intellectual properties that includes *Half-Life*, *Counterstrike*, *Portal* and *Team Fortress*.

Left 4 Dead picked up a slew of awards and sold over 2.5m copies in just four months as of March 2009. Yet it's incredible to think that Valve could yet be remembered more for its pioneering digital distribution technology, Steam, than for its stellar games line-up.

With 20 million users currently enjoying access to more than 600 games via Steam – Valve is at the forefront of video gaming's shift away from bricks-and-mortar retail.

LIONHEAD STUDIOS 22

STATISTICS

Founded:
1997

Owned by:
Microsoft

Contact: 1 Occam Court, Surrey Research Park, Guildford, Surrey GU2 7HJ, UK

www.lionhead.com

KEY RELEASE

When not saving medieval Albion, Fable 2 players can get married and indulge in everything from group sex to divorce

After a couple of troubled years, *Fable 2* propelled Lionhead Studios and its founder Peter Molyneux back to the front rank of game developers.

The wholly-owned Microsoft studio delivered the sequel to widespread press acclaim while also incorporating new gameplay features, including a breadcrumb navigation system and the removal of player death as a 'game over' moment, not to mention a dog companion that morphs according to your alignment. As of March, *Fable 2* had sold 2.6 million copies.

Lionhead is working on downloadable content for *Fable 2*, as well as new games.

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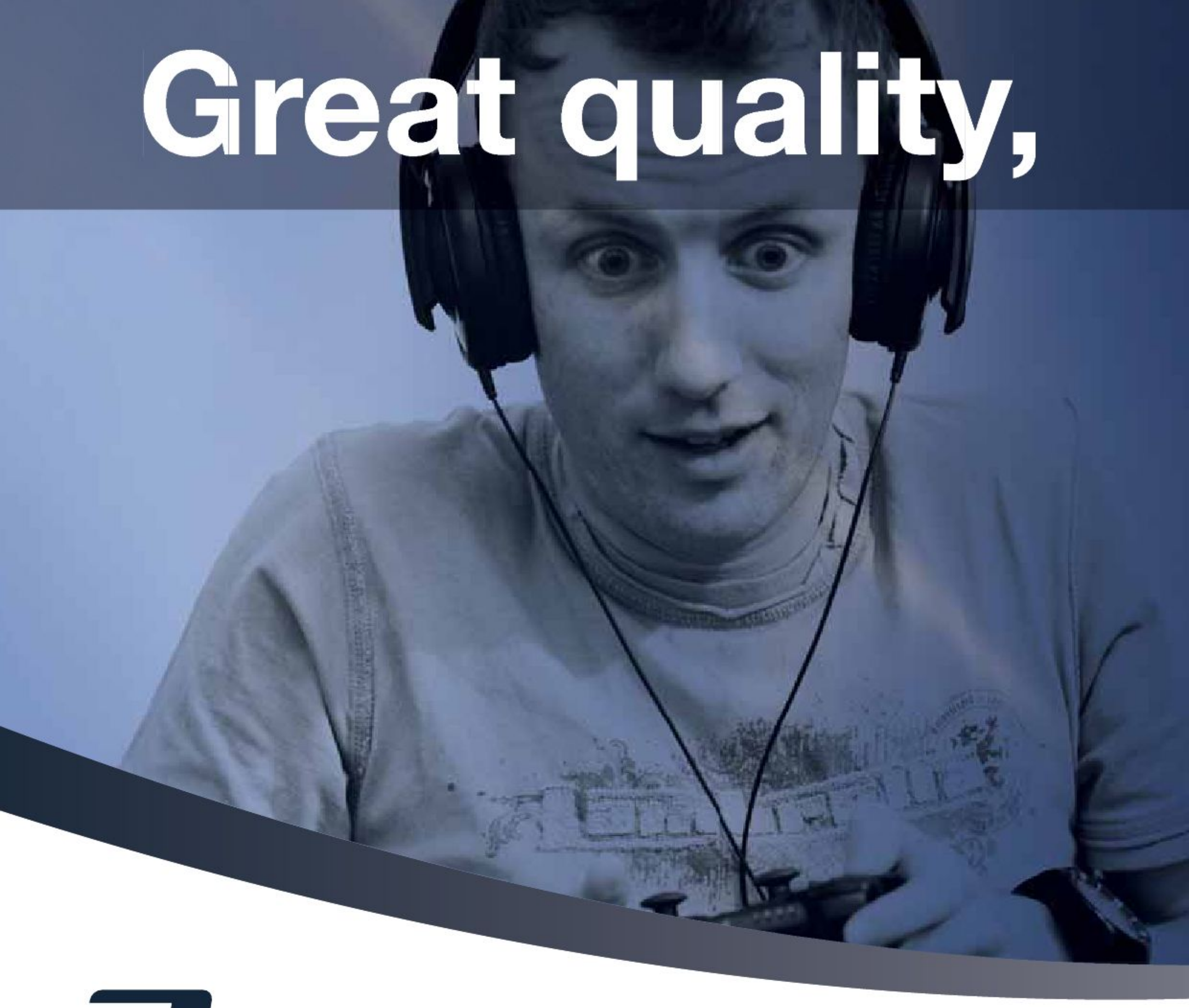

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LEVEL 5 23

STATISTICS

Founded:
1998

Independent

Head count:
205

Contact: 1-20-3 Kamiyo Yakuin Building, Chuo-ku, Fukuoka-shi, Fukuoka-ken, 810-0012, Japan

www.level5.co.jp

KEY RELEASE

A localised Professor Layton and the Diabolical Box – the second game in the trilogy – is set for translation later this year

Since debuting in 2000 with PlayStation RPG *Dark Cloud*, Japanese developer and latterly publisher Level 5 has barely paused, producing multiple RPGs for Sony, Microsoft and Square Enix.

But it was the self-published *Professor Layton and The Curious Village* that transformed the company. The DS game arrived in Japan in 2007, going global in 2008 to huge acclaim.

A new *Layton* trilogy is now in production at the 200-strong developer, as well as a *Layton* movie and Square Enix's *Dragon Quest IX*, Japan's most eagerly anticipated game according to January's *Famitsu*.

EA TIBURON 24

STATISTICS

Founded:
1998

Owned by:
Electronic Arts

Contact: 1950 Summit Park Drive, Orlando, FL 32810, USA

www.ea.com

KEY RELEASE

Madden NFL 09 marked the 20th annual instalment of Electronic Arts' American football series

If EA's Redwood Shores and DICE studios represent EA's refocusing on in-house IP, then EA Tiburon's Florida offices might be the last bastion of 'old EA'.

The powerhouse outfit has delivered annual updates of EA Sports' platinum-plated *Madden NFL* series since the late 1990s, as well the likes of *NCAA Football*, *Tiger Woods PGA Tour* (as of the 2008 edition), and *NASCAR* (until the series concluded last year).

EA Tiburon also managed to staff a seven-man strong team to develop the quirky and rather lovely DS puzzle adventure game *Harry Hatsworth*, released this year.

25 YUKE'S

STATISTICS

Founded:
1993

Independent

Head count:
160

Contact: 4-45-1 Ebisujima, Sakai, Osaka 590-0985, Japan

www.yukes.co.jp

KEY RELEASE

Yuke's innovations and updates for WWE Smackdown vs Raw 09 included an advanced tag team match and four new modes

2008 was a return to form for the venerable wrestling series Yuke's develops for THQ. An externally developed DS version aside, *WWE Smackdown vs Raw 09* garnered good reviews and THQ had shipped four million copies as of its third fiscal quarter. Yuke's has also released downloadable content for the game via Xbox Live and PS3's PSN.

Elsewhere, the Osaka studio took a rare detour into the arcades with *D1 Grand Prix Arcade*, a driving game made for Taito that hit the streets in September 2008.

Meanwhile, Yuke's has just finished *WWE Legends of Wrestlemania*.

26 HARMONIX

STATISTICS

Founded:
1995

Owned by:
MTV

Contact: 625 Massachusetts Avenue, 2nd Floor, Cambridge, MA 02139, USA

www.harmonixmusic.com

KEY RELEASE

Rock Band players have bought 40 million songs from the game's catalogue of over 600 tracks by 269 artists

Judged on its ability to buy up half the others, you could argue Harmonix is among the most powerful developers on this list. Certainly no other wholly-owned studio's founders received $150 million in bonus payments in 2008, with the promise of the same in 2009.

However the payments to founders Alex Rigopoulos and Eran Egoz relate to the studio's acquisition by Viacom in 2006, and more than seven million sales of *Rock Band* since then. 2008's *Rock Band 2* has won commercial and critical success, but with 1.7 million sales across all formats as of the end of 2008, it has a way to go.

A2M 27

STATISTICS

Founded:
1992

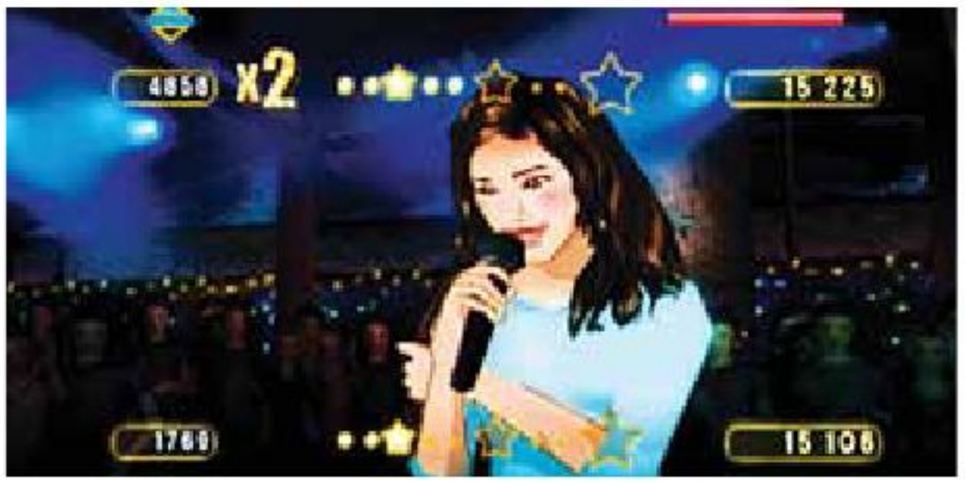
Independent

Head count:
500

Contact: 416 Maisonneuve West, Suite 600, Montreal, Quebec H3A1L2 , Canada

www.a2m.com

KEY RELEASE



A2M was responsible for the early High School Musical games, before they got any good.

Canada's largest independent game developer has bemused us before, and 2008 saw little reason to revise our opinion. A2M games are rarely burdened by high scores, but the *Official Nintendo Magazine*'s 15 per cent rating for A2M's Wii version of *Iron Man* surely represents a new low. *Kung Fu Panda* was slightly better received, at least on DS, but it's fair to say the *High School Musical* skus sold on the back of achievement elsewhere, while the less said about *Mercenaries 2* on PS2 the better.

Yet the Quebec-based company has grown to 500 staff, and recently acquired South America's DLC specialist, Wanako Games.

EA REDWOOD SHORES 28

STATISTICS

Founded:
1982

Owned by:
Electronic Arts

Contact: 209 Redwood Shores Parkway, Redwood City, CA 94065, USA

www.ea.com

KEY RELEASE

A sci-fi horror romp that spooked reviewers in all the right places, Dead Space picked up best new IP awards

Electronic Arts under John Riccitiello is doing the right thing for – so far – the wrong results.

The publisher's focus on original IP over external licences is exemplified by EA Redwood Shores' record in the *Develop 100*. Debuting in 2005 at number four thanks to *Bond* and Tolkien blockbusters, the studio has steadily slipped to 28th this year.

Still, Riccitiello noted recently that "games with a 2 on them sell better", and a Wii *Dead Space* is also in development, while the studio's *The Godfather II* has just gone on sale. It is also working on another new IP, *Dante's Inferno*.

29 JAGEX

STATISTICS

Founded:
2001

Independent

Head count:
400

Contact: St. John's Innovation Centre, Cowley Road, Cambridge, CB4 0WS, UK

www.jagex.com

KEY RELEASE

RuneScape, Jagex's flagship browser-based MMORPG, is a cash cow, with a pay-to-play subscription base of over one million

The days of Jagex being UK game development's best kept secret are long gone. The company behind the Java-based *RuneScape*, the world's most popular free MMORPG, has featured in *The Sunday Times 100 Best Companies To Work For* list for the past two years and its founders are now a fixture in the same newspaper's *Rich List*.

CEO Mark Gerhard, appointed in January, finds himself at the helm of a major operation: Jagex has 400 staff working across three UK studios, an expanding 'deep casual' portal, FunOrb, and a still-growing *RuneScape*, which now boasts over six million active players.

30 GAME FREAK

STATISTICS

Founded:
1992

Owned by:
Nintendo

Head count:
57

Contact: 22F, Carrot Tower, Taishidou, Setagaya-ku, Tokyo 154-0004, Japan

www.gamefreak.co.jp

KEY RELEASE

Pokémon Platinum offers a new storyline involving the strange Distortion World plus gameplay tweaks and fresh mini-games

Game Freak continues to turn what seemed a 1990s fad into enormous sales via new *Pokémon* games.

The latest, *Pokémon Platinum* for the Nintendo DS, was essentially a remake of DS titles *Pokémon Diamond* and *Pearl*, but it still became the best-selling DS game of 2008 in Japan, shifting over two million copies in just four months to December.

Pokémon Platinum went on sale in the US at the end of March, and arrives in Europe in May. For as long as Nintendo continues to make new consoles, it seems Game Freak and its founder and *Pokémon* creator Satoshi Tajiri are assured a place in the *Develop 100*.

MAXIS 31

STATISTICS

Founded:
1987

Owned by:
Electronic Arts

Contact: 2 Theatre Square, Orinda, California, 94563-3346, USA

www.maxis.com

KEY RELEASE

As well as PC expansions, Spore is headed to Nintendo's Wii with Spore Hero and returning to DS with Spore Hero Arena

Expectations for Maxis' *Spore* were so stratospherically high it was bound to disappoint.

What publishing exec wouldn't be happily disappointed by two million sales in three weeks, you might ask? But the reviews amount to a comparatively modest 84 rating on Metacritic, while a DRM furore compounded what fans saw as the injurious dumbing down of Will Wright's original vision.

With Wright leaving the studio he founded 20 years ago to set up Stupid Fun Club, it's uncertain how long the Maxis brand will survive. But extra *Spore* SKUs spearheaded by *Spore Galactic Adventures* are in development.

CAT DADDY GAMES 32

STATISTICS

Founded:
1999

Owned by:
Take-Two

Contact: 14715 Bel-Red Road Suite 100, Bellevue, WA 98007, USA

www.catdaddygames.com

KEY RELEASE

Offering family-orientated mini-games of mediocre quality, Carnival Games has easily outsold the likes of Metroid 3 on Wii

Carnival Games' developer Cat Daddy Games – comprising just a handful of staff, reportedly – has been knocking out value games for the best part of decade. But none have previously come close to the astonishing four million sales racked up by the *Carnival Games* franchise in barely 18 months.

Cat Daddy Games is presently working on a sequel, *Carnival Games 2*, which studio owner 2K Games admitted it delayed because the original was still selling so well. Such humility in the face of the 'known unknown' nature of games publishing would be welcome elsewhere.

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Romain His, Audio Director, Ubisoft

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EA THE SIMS STUDIO 33

STATISTICS

Founded:
2008 (as part of EA's The Sims publishing label)

Owned by:
Electronic Arts

thesims.ea.com

KEY RELEASE

Like several Sims spin-offs of recent years, MySims Kingdom tilts The Sims towards story-telling and adventure territory

An alien unfamiliar with EA's corporate structure might not realise The Sims Label exists; given EA's record of assimilating developers, you might assume it's just a logo on a box.

Actually, the opposite is the case; now headed by industry veteran (and Brit-born) Rod Humble, The Sims Label has a distinct studio structure that served as a model for EA's part-abandoned internal restructuring in 2007.

Sales of *The Sims 2* hit 100m in April 2008 and *MySims* and its sequels went down well on Nintendo platforms. But 2009 will be much bigger, with *SimAnimals* an appetiser as up to 100 staff push to finish *The Sims 3*.

INSOMNIAC GAMES 34

STATISTICS

Founded:
1994

Independent

Head count:
180

Contact: 2255 North Ontario Street, Suite 550, Burbank, California 91504, USA

www.insomniacgames.com

KEY RELEASE

Resistance 2 moved the action from the UK to North America, and added a pioneering 60-player multiplayer mode

This Burbank, California-based studio, which came to prominence with *Spyro the Dragon* on PSOne, has barely hit a duff note in 15 years of business.

2008's sci-fi FPS *Resistance 2* achieved an 87 *Metacritic* rating and sold 400,000 copies in its first week of release. The company also developed *Ratchet & Clank: Quest for Booty*. Just four-hours long, it was initially distributed via PSN. Both titles were published by Sony.

As part of its 15th anniversary celebrations, Insomniac Games is treating its staff and significant others to a cruise to the Bahamas. Otherwise they're hard at work on *Ratchet & Clank Future: A Crack in Time*, due late 2009.

35 POPCAP

STATISTICS

Founded:
2000

Independent

Head count:
180

Contact: 2401 4th Ave, Suite 810
Seattle, WA 98121, USA

www.popcap.com

KEY RELEASE

Peggle Nights updates the Pachinko-inspired original with 60 new levels and 60 additional challenges.

Casual games companies seek that elusive killer title – in *Bejewelled, Peggle, Zuma* and *Bookworm*, PopCap has already created at least four, plus a host of other popular titles that it rolled out in 2008 to everything with a digital pulse.

PopCap's 180-odd staff go a long way: its titles have a longevity that conventional game publishers should have killed for when the market was young and they had a chance. Last August, for instance, PopCap revealed the *Bejewelled* franchise had sold 25m units since 2000. Latest release, *Peggle Dual Shot* for the Nintendo DS, continues PopCap's overtures towards the more traditional gamer.

36 SCE LONDON STUDIO

STATISTICS

Founded:
1993

Owned by:
Sony

Head count:
260

Contact: 15 Great Marlborough Street, London W1F 7HR, UK

www.scee.com

KEY RELEASE

Content distributed via the SingStar community portal has been viewed more than 10 million times

2008 wasn't a great year to work at SCE London Studio; two high-profile games – *The Getaway 3* and *Eight Days* – were cancelled. Yet there was good news, too, not least the successful transfer of *SingStar* to PS3.

Hopping up to the console in late 2007 and since followed up with two sequels, over four million songs have already been downloaded from the associated SingStore. Game sales for the entire *SingStar* franchise have surpassed 16 million.

Away from karaoke, SCE London Studio is working on *EyePet*, which utilises the PlayStation Eye, and continues to evolve PlayStation Home.

37 CRITERION GAMES

STATISTICS

Founded:
1993

Owned by:
Electronic Arts

Contact: Ouslow House, Onslow Street, Guildford, GU1 4TN, UK

www.criteriongames.com

KEY RELEASE

EA bundled much of Criterion's Burnout Paradise DLC into a new release, Burnout Paradise: The Ultimate Box, in early 2009

Few developers have explored downloadable content like EA's Criterion Games. The Guildford-based studio has delivered copious updates and add-ons to *Burnout: Paradise* throughout 2008 and early 2009.

But a studio of Criterion's calibre surely isn't living on DLC alone. Back in early 2008 Electronic Arts executives mentioned new *Burnout* games to analysts but there's been no confirmation to date from the studio or publisher, nor more news on *Black: Second Mission*, a project which came to light via the ever-leaky route of recruitment advertising in December.

38 SPORTS INTERACTIVE

STATISTICS

Founded:
1994

Owned by:
Sega

Contact: PO Box 60255, London, EC1P 1GG, UK

www.sigames.com

KEY RELEASE

Football Manager 2009 saw Sports Interactive bow to the inevitable with the addition of a full 3D match engine

November 2008 saw the launch of the long-awaited *Football Manager Live*, one of the more ambitious game IP extensions of recent years. It now has around 25,000 subscribers, distributed across 26 gameworlds and contributing to revenues generated by the initial full price retail purchase with recurring monthly subscription fees of around £5-8. For a developer with a famously dedicated fanbase, the attraction is obvious. Non-UK language versions are set to come later this year.

Besides *Football Manager Live*, Sports Interactive's 50 full-time staff continue to work on ongoing standalone titles.

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39 UBISOFT FRANCE

STATISTICS

Founded:
1986

Owned by:
Ubisoft

Contact: 28 rue Armand Carrel, 93 108 Montreuil Cedex, France

www.ubisoftgroup.com

KEY RELEASE

Rayman Rabbids TV Party is compatible with the Wii Balance Board, which won't have hurt its Christmas 2008 performance

With a global spread of studios that reads like Phileas Fogg's travel itinerary, Ubisoft's home developers must feel the equivalent of pipe and comfortable slippers.

In 2008 the Paris and Montpelier studios largely contented themselves with the Nintendo exclusive *Rayman Rabbids TV Party*. It only popped up in November, but it had shifted 1.5 million by January, and like all *Rayman* games will sell for months to come.

2007's *Rayman Raving Rabbids 2* continued to shift in 2008, for instance; *Rayman* remains the 25 million-selling franchise the industry always forgets.

40 ROCKSTAR SAN DIEGO

STATISTICS

Founded:
1984 (as Angel Studios)

Owned by:
Rockstar Games

Head count:
180

Contact: 2200 Faraday Ave, Suite 200, Carlsbad, California, 92008, USA

www.rockstarsandiego.

KEY RELEASE

The map in Midnight Club: Los Angeles is larger than all three maps of the previous title combined together

Knuckling down after the off-beam larks of 2006's engine test drive turned top game, *Rockstar Games Presents Table Tennis*, 2008 saw Rockstar San Diego deliver the well-received *Midnight Club: Los Angeles* for Xbox 360 and PS3, which parent Take Two cited as contributing to a 'better than expected' performance in its first fiscal quarter for 2009.

Rockstar San Diego is currently developing *Red Dead Redemption*. While it will always struggle to grab the limelight from Rockstar North, the 180 staff enjoy certain compensations, such as working five minutes from the Californian surf.

41 KROME STUDIOS

STATISTICS

Founded:
1999

Independent

Head count:
350

Contact: PO Box 1639, Fortitude Valley, QLD 4006, Australia

www.kromestudios.com

KEY RELEASE

The Force Unleashed game was part of a wider project that included LEGO and Hasbro toys, a Dark Horse comic and a novel

Founded 10 years ago by CEO Robert Walsh and creative director Steve Stamatiadis, Krome Studios has continued to grow while other Australian developers have languished. The company now employs 350 people, including the staff at Krome Studious Melbourne – better known before its 2006 acquisition by Krome as the 8-bit pioneer Melbourne House.

2008 was a big year for Krome, with two LucasArts titles – *Star Wars: The Force Unleashed* for Wii, PS2, and PSP and *The Clone Wars: Lightsaber Duels* for Wii – seeing retail release alongside *Scene-it: Box Office Smash*, which it produced for Microsoft.

42 GAMELOFT

STATISTICS

Founded:
1999

Independent

Head count:
3,000+

Contact: 14 rue Auber, 75009, Paris, France

www.gameloft.com

KEY RELEASE

The Oregon Trail was one of Gameloft's best-selling titles in 2008, picking up high scores and awards

Only the low per-unit pricing of mobile games keeps Gameloft from appearing far higher up this list.

Big licences like *Spiderman* help, but the company says 61 per cent of downloads are of its own brand games. Rivalled only by EA on the operators' portals, with 3,300 development staff, the top mobile publisher also has an unrivalled ability to respond quickly to ever-changing mobile technology.

For instance, Gameloft released more than two dozen games for Apple's iPhone and iPod Touch in 2008, selling two million games via the App Store and hogging the paid game charts.

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CEO Robert Walsh and Creative Director Steve Stamatiadis lead a team of 400 talented game creators, spread across offices in Brisbane, Melbourne and Adelaide.

Krome's success can be attributed to their seasoned technical and creative developers, who add fresh eyes to each new project. With a strong internal QA team and one of the industries only next-generation game engines - the Merkury Engine - Krome is able to deliver the best product possible within the development time frame.

2008 - Krome's biggest year to date – saw them release LucasArts fastest selling title: Star Wars®: The Force Unleashed™ on the Wii™, PS2 and PSP®, the ultimate Lightsaber game Star Wars® The Clone Wars™: Lightsaber™ Duels exclusive to the Wii and Scene It? ® Box Office Smash! on Xbox 360®.

This seasoned developer has shipped 18 titles on 83 sku's worldwide including Australia's highest selling original character, TY the Tasmanian Tiger™, and is showing no signs of stopping with the highly anticipated TRANSFORMERS™: Revenge of the Fallen game on the Wii and PS2 and their new original IP "Blade Kitten" all due for release in 2009.

For more information see www.kromestudios.com or contact press@kromestudios.com

KROME STUDIOS

43 CRYSTAL DYNAMICS

STATISTICS

Founded:
1992

Owned by:
Eidos/Square Enix

Contact: 64 Willow Place, Menlo Park, 94025, California, USA

www.crystald.com

KEY RELEASE

Toby Gard, the animator who created Lara Croft, served as cinematics director for Tomb Raider: Underworld

With the once emblematic Britsoft creation *Tomb Raider* now firmly established at Californian developer Crystal Dynamics, the latter continues to deliver big revenues to parent Eidos thanks to its broadly successful annual updates of the IP.

The latest, *Tomb Raider: Underworld*, had sold 2.6m copies as of February on the back of respectable reviews, outselling the previous two games in the series. Eidos professed disappointment though, and it wasn't enough to save 30 staff shed by Crystal Dynamics in January, including Eric Lindstrom, *Underworld*'s creative director.

44 SQUARE ENIX

STATISTICS

Founded:
1975

Owned by:
Square Enix

Head count:
1,700

Contact: Shinjuku Bunka Quint Bldg., 3-22-7 Yoyogi, Shibuya-ku, Tokyo 151-8544, Japan

www.square-enix.com

KEY RELEASE

Crisis Core Final Fantasy VII was released in Japan in 2007, but it sold well throughout 2008 after arriving in the US and Europe

Consider that Square Enix is yet to develop and release a game on PS3, and it's less surprising to find it at position 44. 2007's PSP prequel *Crisis Core: Final Fantasy VII* got a release outside of Japan in 2008, selling very well, but *Song Summoner* for iPod and WiiWare release *Final Fantasy Crystal Chronicles: My Life As A King* were undeniably niche products.

Xbox 360 RPG *The Last Remnant* was the only substantial release of the year. Arriving in late November, reviews were very inconsistent. An outlying 38/40 from the influential *Famitsu* will have helped its 100,000 first week sales at home, however.

45 NAMCO BANDAI

STATISTICS

Founded:
1955

Owned by:
Bandai Namco

Head count:
2,000

Contact: Mirai-Kenkyusho 4-5-15, Higashi-shinagawa, Shinagawa-ku, Tokyo, 140-8590

www.bandainamcogames.co.jp

KEY RELEASE

Soul Calibur IV's character creation mode enables you to design a bespoke fighter to suit your style of play

Sprawling Namco Bandai remains a serious force in games publishing in its native Japan. However many of its most popular titles, such as the *Dragon Ball Z* series, are developed externally.

The core studio's most significant self-created release in 2008 by far was *Soul Calibur IV*, which had shipped over two million units by the end of 2008. It rather bizarrely enabled players to choose to fight as guest characters from *Star Wars*, and it also brought internet battling to the venerable series. Reviews were very positive.

Another notable release was *We Ski*, which utilises the Wii Balance Board.

46 BLACK ROCK STUDIO

STATISTICS

Founded:
1988 (as part of Climax; sold to Disney and rebranded in 2006)

Owned by:
Disney Interactive Studios

Head count:
142

Contact: 15 West Street, Brighton, BN1 2RE, UK

www.blackrockstudio.com

KEY RELEASE

Pure was named the Best Racing Game of E3 2008 in The Game Critics Awards. It went on retail release in September

The former Climax Racing studio has enjoyed a successful first full year under the ownership of Disney, thanks to the release of the well-received *Pure*. Achieving 9/10 from *Official Xbox Magazine*, *Pure* saw the developer return to the quad bike territory it had previously explored with the latter games in Sony's *ATV Off-Road Fury* series.

Black Rock is now working on *Split/Second*, a city-based racing game due for release in 2010 for Xbox 360, PlayStation 3 and PC. Themed around a reality TV show, competitors will be able to trigger explosive events that change the race dynamics by re-routing the course in real-time.

47 RELENTLESS SOFTWARE

STATISTICS

Founded:
2003

Independent

Head count:
80

Contact: One Air Street, Brighton, BN1 3FB, UK

www.relentless.com

KEY RELEASE

Buzz!: Quiz TV was published by SCEE, which has published all of Relentless' titles since the company's inception in 2003

2008 was a big year for Brighton-based Relentless. After shipping two PS2 games in early 2008 (*Buzz!: The Schools Quiz* and *Buzz!: The Pop Quiz*) the studio knuckled down to deliver *Buzz!: Quiz TV*, the series' PS3 debut, featuring wireless controllers and online play, and new user-generated quizzes and other community features. It also worked with London's Curve Studios to bring *Buzz!* to PSP (subsequent titles have been Curve and Sony's work alone).

The company's 80 staff are currently working on various versions of the *Buzz!* franchise, and also on an unannounced self-published PSN title.

48 PANDEMIC STUDIOS

STATISTICS

Founded:
1998

Owned by:
Electronic Arts

Head count:
200

Contact: 1100 Glendon Avenue, 19th Floor, Los Angeles, California 90024-3503, USA

www.pandemicstudios.com

KEY RELEASE

Reviewers applauded Mercenaries 2: World in Flames' explosive effects, but its gameplay, narrative and bugs won fewer fans

The difference between Pandemic's games as an independent and its output since joining with Bioware and subsequently EA is striking.

Whereas Pandemic's first generation IPs such as *Mercenaries*, *Full Spectrum Warrior* and *Star Wars Battlefront* were critically acclaimed hits, last year's *Mercenaries 2* received only fair-to-poor reviews, and was deemed Most Disappointing Game by *Gamespot*.

Fans must hope the long silence surrounding *The Saboteur*, one of three big titles in production, indicates Pandemic's 200 LA-based staff have had their heads down redressing matters.

EUROCOM 49

STATISTICS

Founded:
1988

Independent

Head count:
280

Contact: Eurocom House, Ashbourne Road, Derby, Derbyshire, DE22 4NB, UK

www.eurocom.co.uk

KEY RELEASE

Beijing 2008 received an unusually wide range of reviews, but the authentic visual representation was universally praised

Employing 280 staff, Eurocom continues to be a bastion of British development, 21 years after it arrived on the scene with *Magician* for the NES.

2008 saw the Derby-based company deliver four titles, led by the multi-format *Beijing 2008*. Licensed game duties continued with two movie tie-ins – Wii and PS2 versions of *The Mummy: Tomb of the Dragon Emperor*, and the critically well-received PS2 version of *Quantum of Solace*.

Eurocom is currently working on *Dead Space Extraction*, a Wii prequel for EA's high-profile sci-fi IP, and on PC, Xbox 360 and PS3 versions of *Vancouver 2010* for Sega.

EA LOS ANGELES 50

STATISTICS

Founded:
1995

Owned by:
Electronic Arts

Contact: 5510 Lincoln Blvd, Playa Vista, CA 90094, USA

www.eala.com

KEY RELEASE

In one of C&C: Red Alert 3's endings, David Hasselhoff becomes President of America. That's surely worth winning a war for

A new *C&C* game? A game designed by Steven Spielberg? Ten years ago these bullet points would have placed EA LA far higher in the *Develop 100*.

That's not to say 2008 was a bad year. *C&C: Red Alert 3* on PC and Xbox 360 achieved decent enough scores, especially for its high production values and the expansion of its multiplayer and cooperative options. And Spielberg's puzzle game *Boom Blox* won genuinely rave reviews.

Initial sales of *Boom Blox* were weak, however, although EA put that down to the longer lifecycle of a casual title, and it recently confirmed a sequel.

51 REBELLION

STATISTICS

Founded: 1992

Independent

www.rebellion.co.uk

KEY RELEASE

The Simpsons

52 LUXOFLUX

STATISTICS

Founded: 1998

Owned by: Activision

www.luxoflux.com

KEY RELEASE

Kung Fu Panda

53 BUNGIE

STATISTICS

Founded: 1991

Independent

www.bungie.net

KEY RELEASE

Halo 3

54 ATLUS

STATISTICS

Founded: 1986

Owned by: Atlus

www.altus.com

KEY RELEASE

Persona 4

55 EA MYTHIC

STATISTICS

Founded: 1995

Owned by: Electronic Arts

www.mythicentertainment.com

KEY RELEASE

Warhammer Online: Age of Reckoning

HB STUDIOS 56

STATISTICS

Founded: 2000

Independent

www.hb-studios.com

KEY RELEASE

BIG Beach Sports

MONKEY BAR GAMES 57

STATISTICS

Founded: 2005

Owned by: Vicious Cycle

www.monkeybargames.com

KEY RELEASE

Ben 10: Protector of Earth

CODEMASTERS STUDIOS 58

STATISTICS

Founded: 1985

Owned by: Codemasters

www.codemasters.com

KEY RELEASE

Race Driver GRID

THE CREATIVE ASSEMBLY 59

STATISTICS

Founded: 1987

Owned by: Sega

www.creative-assembly.co.uk

KEY RELEASE

Viking: Battle for Asgard

BIG FISH 60

STATISTICS

Founded: 2002

Independent

www.bigfishgames.com

KEY RELEASE

Mystery Case Files: Return to Ravenhearst

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Victoria House, Victoria Road
Aldershot, Hants GU11 1EJ

www.testology.co.uk

CRYTEK 61

STATISTICS

Founded: 1999

Independent

www.crytek.com

KEY RELEASE

Crysis Warhead

NCSOFT 62

STATISTICS

Founded: 1997

Owned by: NCsoft

www.ncsoft.com

KEY RELEASE

Lineage II

FIRAXIS 63

STATISTICS

Founded: 1996

Owned by: Take-Two

www.firaxis.com

KEY RELEASE

Sid Meier's Civilization Revolution

EA DICE 64

STATISTICS

Founded: 1988

Owned by: Electronic Arts

www.dice.se

KEY RELEASE

Mirror's Edge

KOEI 65

STATISTICS

Founded: 1978

Owned by: Koei

www.koei.com

KEY RELEASE

Dynasty Warriors 6

66 RELIC

STATISTICS

Founded: 1997

Owned by: THQ

www.relic.com

KEY RELEASE

Company of Heroes Online

67 RARE

STATISTICS

Founded: 1984

Owned by: Microsoft

www.rareware.com

KEY RELEASE

Banjo-Kazooie: Nuts & Bolts

68 DIGITAL CHOCOLATE

STATISTICS

Founded: 2003

Independent

www.digitalchocolate.com

KEY RELEASE

Tower Bloxx Deluxe

69 CLUB PENGUIN

STATISTICS

Founded: 2005

Owned by: Disney

www.clubpenguin.com

KEY RELEASE

Club Penguin: Elite Penguin Force

70 CCP

STATISTICS

Founded: 1997

Independent

www.ccpgames.com

KEY RELEASE

EVE Online: Quantum Rise

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(www.idsoftware.com)

chose IncrediBuild to accelerate pre-calculation of spatial awareness data for artificial intelligence (AI) controlled characters in their computer games. As a result, execution time dropped from 28-30 minutes to less than 4 minutes.

Bohemia Interactive
(www.bistudio.com)

were already using IncrediBuild to accelerate Visual Studio builds. After a simple integration process, a script for processing computer game satellite imagery data that originally took 8 hours to complete now runs in 40 minutes.

Read more at: **www.xoreax.com/casestudies**

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71 ZOE MODE

STATISTICS

Founded: 1998

Owned by: Kuju Entertainment

www.zoemode.com

KEY RELEASE

You're In The Movies

72 EVOLUTION

STATISTICS

Founded: 1999

Owned by: Sony

www.evos.net

KEY RELEASE

MotorStorm Pacific Rift

73 VOLITION

STATISTICS

Founded: 1996

Owned by: THQ

www.volition-inc.com

KEY RELEASE

Saints Row 2

74 BIZARRE CREATIONS

STATISTICS

Founded: 1994

Owned by: Activision

www.bizarrecreations.com

KEY RELEASE

The Club

75 THE COOKING MAMA COMPANY

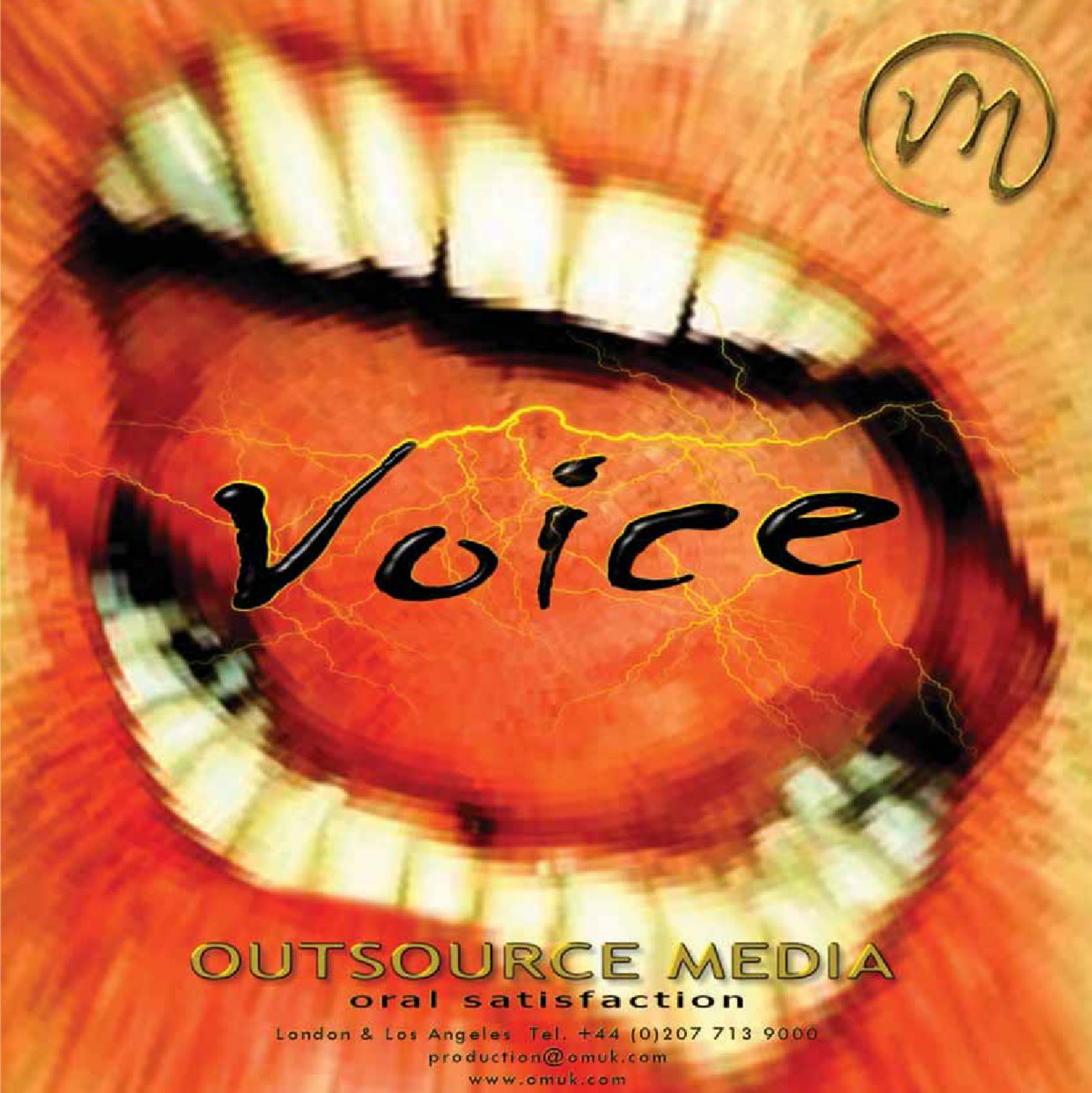
STATISTICS

Independent

www.ofcr.co.jp

KEY RELEASE

Cooking Mama 2: Dinner With Friends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76 HEAVY IRON

STATISTICS

Founded: 1999

Independent

www.heavy-iron.com

KEY RELEASE

Wall-E

77 EA BIOWARE

STATISTICS

Founded: 1995

Owned by: Electronic Arts

www.bioware.com

KEY RELEASE

Mass Effect

78 GEARBOX

STATISTICS

Founded: 1999

Independent

www.gearboxsoftware.com

KEY RELEASE

Brothers In Arms Hell's Highway

79 SUMO DIGITAL

STATISTICS

Founded: 2004

Owned by: Foundation 9

www.sumo-digital.com

KEY RELEASE

Sega Superstars Tennis

80 EA BRIGHT LIGHT

STATISTICS

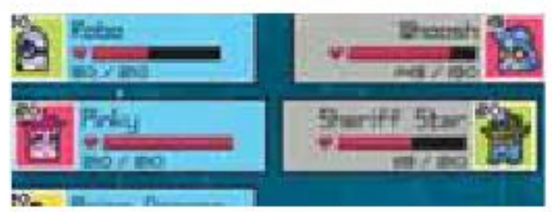
Founded: 2008 (via rebranding)

Owned by: Electronic Arts

www.ea.com

KEY RELEASE

Zubo



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81 POLYPHONY DIGITAL

STATISTICS

Founded: 1998

Owned by: Sony

www.polyphony.co.jp

KEY RELEASE

Gran Turismo 5 Prologue

82 SCE JAPAN STUDIO

STATISTICS

Founded: 1998

Owned by: Sony

www.scei.co.jp

KEY RELEASE

Siren: Blood Curse

83 FUNCOM

STATISTICS

Founded: 1993

Independent

www.funcom.com

KEY RELEASE

Age of Conan – Hyborian Adventures

84 TEAM 17

STATISTICS

Founded: 1987

Independent

www.team17.com

KEY RELEASE

Worms: Open Warfare 2

85 SILICON KNIGHTS

STATISTICS

Founded: 1992

Independent

www.siliconknights.com

KEY RELEASE

Too Human

EA MONTREAL 86

STATISTICS

Founded: 2003

Owned by: Electronic Arts

www.eamontreal.com

KEY RELEASE

Army of Two

ROCKSTAR LEEDS 87

STATISTICS

Founded: 1997 (as Mobius)

Owned by: Rockstar Games

www.rockstarleeds.co.uk

KEY RELEASE

GTA: Vice City Stories

GRASSHOPPER MANUFACTURE 88

STATISTICS

Founded: 1998

Independent

www.grasshopper.co.jp

KEY RELEASE

No More Heroes

INIS 89

STATISTICS

Founded: 1997

Independent

www.inis.jp

KEY RELEASE

Lips

AMUSEMENT VISION 90

STATISTICS

Founded: 2000

Owned by: Sega

www.amusementvision.com

KEY RELEASE

Yakuza Kenzan!

91 UBISOFT SHANGHAI

STATISTICS

Founded: 1996

Owned by: Ubisoft

www.ubisoftgroup.com

KEY RELEASE

Tom Clancy's EndWar

92 BEENOX

STATISTICS

Founded: 2000

Owned by: Activision

www.beenox.com

KEY RELEASE

Kung Fu Panda

93 BLUE TONGUE

STATISTICS

Founded: 1995

Owned by: THQ

www.bluetongue.com

KEY RELEASE

deBlob

94 MATRIX

STATISTICS

Founded: 1994

Independent

www.matrixsoft.co.jp

KEY RELEASE

Final Fantasy IV

95 BLITZ GAMES

STATISTICS

Founded: 1990

Independent

www.blitzgames.com

KEY RELEASE

American Idol 2: Encore

DIMPS 96

STATISTICS

Founded: 2000

Independent

www.dimps.co.jp

KEY RELEASE

Street Fighter IV Arcade

INTELLIGENT SYSTEMS 97

STATISTICS

Founded: 1984

Owned by: Nintendo

www.intsys.co.jp

KEY RELEASE

Advance Wars: Dark Conflict

PLAYFISH 98

STATISTICS

Founded: 2007

Independent

www.playfish.com

KEY RELEASE

Word Challenge

FRONTIER DEVELOPMENTS 99

STATISTICS

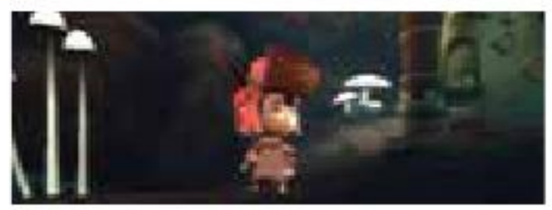
Founded: 1994

Independent

www.frontier.co.uk

KEY RELEASE

Lost Winds



Q GAMES 100

STATISTICS

Founded: 2001

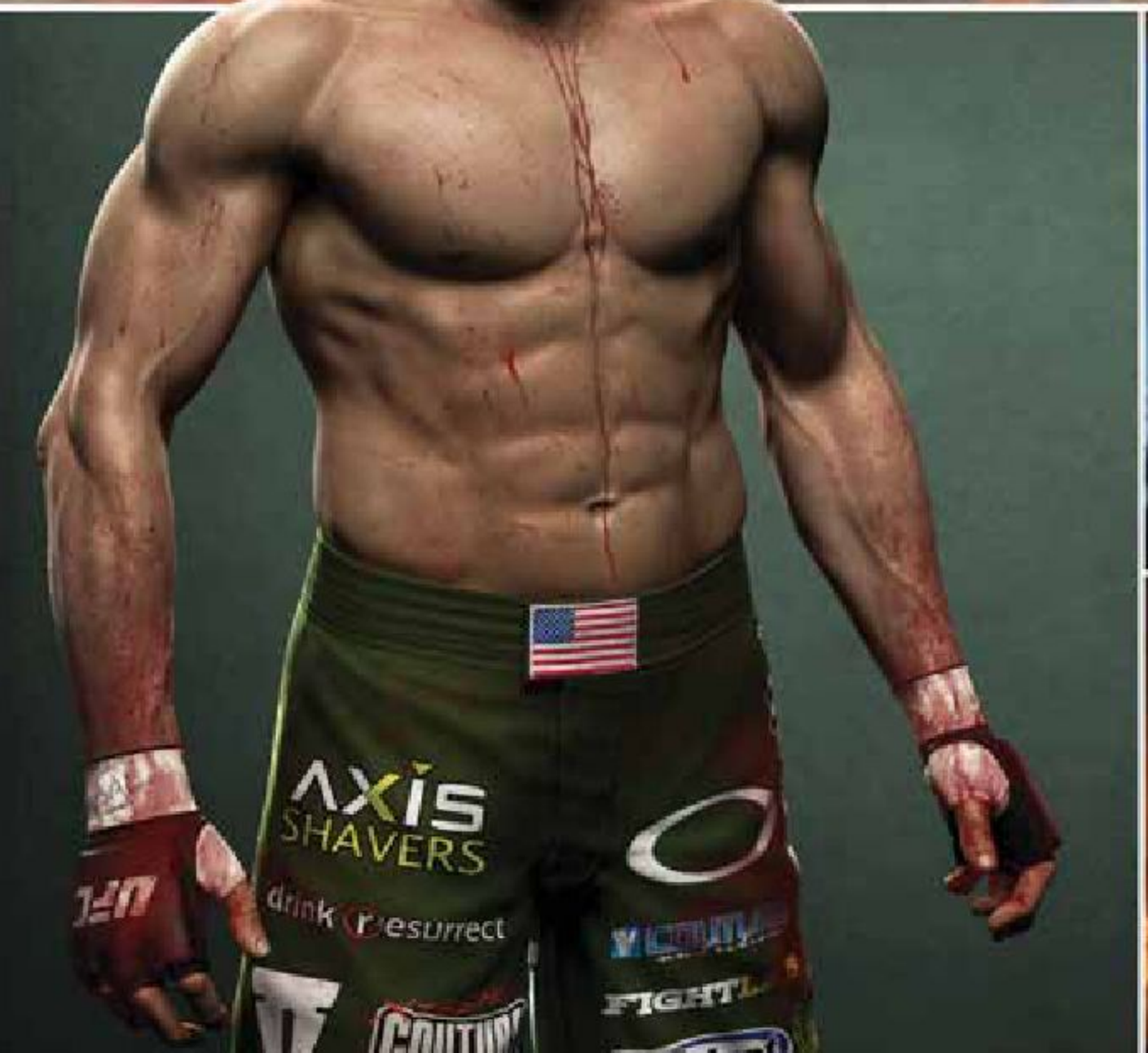
Independent

www.q-games.com

KEY RELEASE

PixelJunk series

CONCEPTS
GAME CINEMATICS
MARKETING IMAGERY



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andrew@realtimeuk.com
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THE WORLD'S MOST BANKABLE GAME STUDIOS

develop 100

1-100

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4	EA Canada	Canada	16
5	Capcom	Japan	18
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7	Treyarch	USA	21
8	Infinity Ward	USA	22
9	Epic Games	USA	23
10	Bethesda Softworks	USA	24
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15	Neversoft	USA	32
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25	Yuke's	Japan	48
26	Harmonix	USA	48
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28	EA Redwood Shores	USA	49
29	Jagex	UK	50
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49	Eurocom	UK	65
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53	Bungie	USA	66
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96	Dimps	Japan	81
97	Intelligent Systems	Japan	81
98	Playfish	UK	81
99	Frontier Developments	UK	81
100	Q Games	Japan	81

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